



WISEid

Overview



January 2016



This 3 minute video will give you an overview of the WISEid process. For each step in the process please either refer to the specific instructions provided by your vendor or the individual DPI videos.

WISEid Defined

Person ID Management Application

- One WISEid = one person, replaces SSN for staff
- Will also be replacing the WSN number for students
- ID assigned by the agency holding the HR record
- Open all year long for maintenance



WISEid is a person id management application.

Each person will have one WISEid, this will replace the SSN for staff and the WSN for students

The ID is assigned by the agency that holds the HR record.

WISEid will be open all year long for maintenance.

WAMS ID with Access to WISEid

- Access to the WISEid application
- Use your WAMS ID to log in to Secure Home and click on WISEstaff



In order to complete the steps to submitting WISEid data, you must first have access to the WISEid application. Use your WAMS ID to log in to Secure Home and click on WISEid. If you do not have a WAMS ID, view the video specific to creating a WAMS account.

Preliminary Tasks in your SIS

Prior to submitting a file to WISEid, ensure that the following has been completed in your Student Information System (SIS):

- Based on information from your Vendor, know which field is being used for the “Local Person ID” for each your students and staff
- Other directions or guidance from your Vendor



Prior to submitting a file to WISEid, ensure that the following has been completed in your Student Information System (SIS):

- Based on information from your Vendor, know which field is being used for the “Local Person ID” for each your students and staff
- Other directions or guidance from your Vendor

Creating a Student WISEid file

Once you have completed the preliminary tasks, you should be ready to create a Student WISEid Person Request file.

Follow the specific directions provided by your Vendor to query, review warnings, resolve warnings and saving the file.

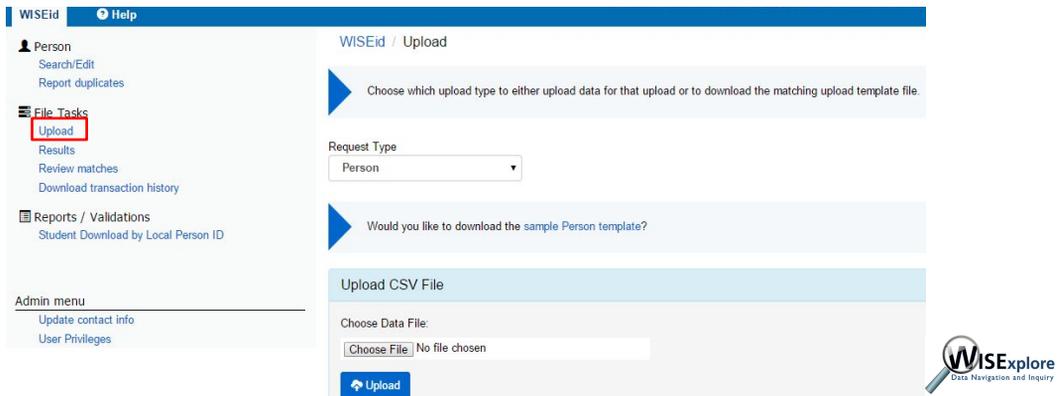


Once you have completed the preliminary tasks, you should be ready to create a Student WISEid Person Request file.

Follow the specific directions provided by your Vendor to query, review warnings, resolve warnings and saving the file.

Submitting the File in WISEid

Once you have created a file from your SIS, it is time to submit to the DPI.



The screenshot displays the WISEid user interface for the 'Upload' process. On the left, a navigation menu includes 'Person', 'File Tasks', and 'Reports / Validations'. The 'File Tasks' menu is expanded, and the 'Upload' option is highlighted with a red rectangular box. The main content area is titled 'WISEid / Upload' and contains the following elements:

- A blue arrow icon pointing right, followed by the instruction: "Choose which upload type to either upload data for that upload or to download the matching upload template file."
- A 'Request Type' dropdown menu currently set to 'Person'.
- Another blue arrow icon pointing right, followed by the question: "Would you like to download the sample Person template?"
- A section titled 'Upload CSV File' containing a 'Choose Data File:' label, a 'Choose File' button, and the text 'No file chosen'.
- A blue 'Upload' button with a white arrow icon.

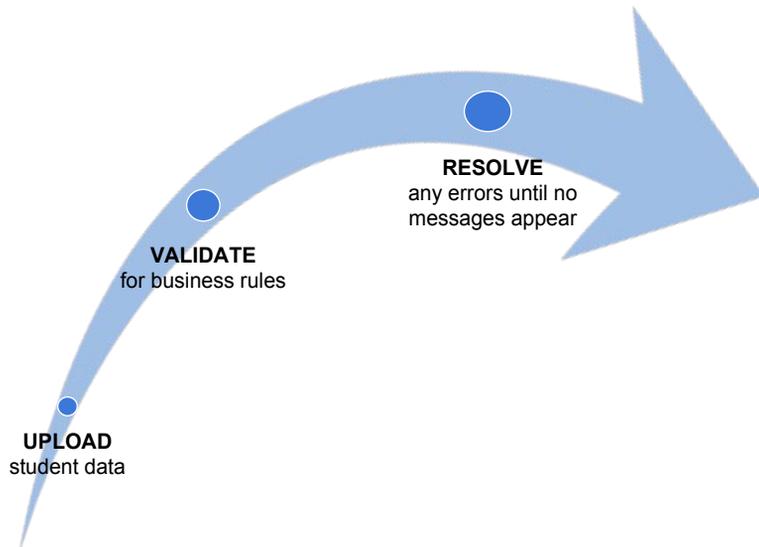
The WISEid logo is located in the top left corner, and the WISE Explore logo is in the bottom right corner.

Once you have created a file from your SIS, it is time to submit to the DPI.

From the **File Tasks** menu, click on the **Upload** link to begin the upload process.

Please see the specific video on “Uploading a File from SIS/HR System” for step by step directions.

Clearing level 1 Validations



Validation in WISEid checks your WISEid data.

The system will then run business rules against your data, you will resolve any errors until no messages appear.

Submitting the Corrected File

WISEid / Upload

Choose which upload type to either upload data for that upload or to download the matching upload template file.

Request Type: Person

Would you like to download the sample Person template? WISEid / Help

Upload CSV File

Choose Data File: Choose File | No file chosen

Upload

WISEid / Results

File queue of all file uploads types and their status is located here. Shows status while files are not yet complete and also after completion. When file processing is complete you can matches to be resolved. Downloads provide an upload results file including results and any errors.

File Name: Status: Select Status... Upload Date:

Request Type: Person

Search

Type	File name	Status	Errors	Potential matches	Committed	Upload date
IP	WISEid Persons_New.csv	Completed	1	0	0	01/08/2016 10:43:37 AM
IP	wiseids.csv	Completed	0	0	315	05/13/2015 01:59:08 PM
IP	wiseids.csv	Completed	0	0	315	04/24/2015 03:03:00 PM



Once you have resolved your errors in your Student Information System, you will submit a new file through the WISEid interface.

Please note that the new file does not remove the errors in the old result.

Please see the specific video on “Uploading a File from SIS/HR System” for step by step directions.

Performing Match Reviews

Potential matches found

Some of the people you upload may match existing people in our system. Please review all potential matches to avoid creating duplicates.

WISEid | WISE DPI Administration | Help | Welcome: Testy McTesterson | Agency: Wisconsin Dept of Public Instruction | Change Agency | Logout

Person
Search/Edit
Report duplicates

File Tasks
Upload

Results
Review matches
Download transaction history

Reports / Validations
Student Download by Local Person ID

Admin menu
Update contact info
User Privileges

WISEid | Review matches

Potential matches found
Some of the people you upload may match existing people in our system. Please review all potential matches to avoid creating duplicates.

Remove Selected

id	Local Person ID	First name	Middle name	Last name	Suffix	Gender	Birthdate	Race	Entity ID		
27		Trey	A	Anderson		M	2/25/2001	0037		Review	Remove
407242013		Carne	R	Baker		F	1/1/1970	0037	11397	Review	Remove
65880932		Alex	M	Casper		M	3/25/1997	0006		Review	Remove
695277		Timothy		Duffy		M	8/7/1975	0037		Review	Remove
74355794		Maile	G	Even-Baker		F	6/8/1997	0006		Review	Remove
57594		Linda		Frank		F	8/4/1967	0037		Review	Remove
74344345		Hoewisch	J	Galante		M	7/30/1997	0006		Review	Remove
89048		Cynthia		Ingersoll		F	6/12/1948	0037		Review	Remove
27819688294		KAYLA	M	Kelly		F	2/1/2002	0037		Review	Remove
27619345588		MEGAN	L	Larson		F	10/30/1999	0037		Review	Remove
268022		Jennifer		Montey		F	3/3/1966	0037		Review	Remove



Once you have a successful upload, you can start working with your data.

From the **File Tasks** menu, click on the **Review matches** link to begin reviewing matches.

The reason for match review is to ensure that the people you upload in your file do not match others in the DPI system. If a potential match is found, those staff will be listed when you click review matches.

Please see the specific video on “Match Review” for step by step directions.

Downloading Results

The screenshot shows the WISEid web application interface. At the top, there is a navigation bar with 'WISEdid', 'WISEstaff', 'WISE DPI Administration', and 'Help'. The user is identified as 'Welcome Karen Gabriel' and the agency is 'Wisconsin Dept of Public Instruction'. There are links for 'Change Agency' and 'Logout'. On the left, a sidebar menu includes 'Person', 'File Tasks', and 'Reports / Validations'. The 'Download transaction history' option under 'File Tasks' is highlighted with a red box. The main content area is titled 'WISEdid / Download transaction history' and contains a blue arrow pointing to the right with the text 'Select a beginning and end date range to download all transaction results history including errors in CSV format.' Below this, there are two date input fields: 'From' with the value '01/01/2016' and 'To' with the value '01/31/2016'. A blue 'Download' button is positioned below the 'To' field.



From the File Tasks menu, click on **Download transaction history**. A CSV file containing your history will be downloaded to your local PC. By entering a date range, all the potential matches resolved in a specific period may be reported, as well as information on duplicate merges completed by DPI, review record modifications, and more.

The Download Transaction History file could be used to update or automate changes in your local information system, SIS, HR system, etc.

Please see the specific video on “Downloading the Person by Local Person ID file” for step by step directions.



WISEid

Overview



For directions on each of these specific tasks, please refer to the individual videos. Thank you for watching this video.